



STATE OF WASHINGTON
DEPARTMENT OF COMMUNITY,
TRADE AND ECONOMIC DEVELOPMENT

Overseas Travel to Washington State 2002

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Prepared by:

Dean Runyan Associates
833 SW 11th Avenue, Suite 920
Portland, Oregon 97205
(503) 226-2973
www.deanrunyan.com

Prepared for:

Washington State Office of Trade and
Economic Development
Business & Tourism Development
www.experiencewashington.com/industry

Martha Choe
Director

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Overseas Travelers to Washington

Overseas Arrivals

In any given year, overseas visitors to the State of Washington come from many different countries (some 75 in 2002). However, consistently there are a few which tend to provide most of the visits year-in, and year-out. Washington State Tourism has established marketing programs and targets for these key countries. This study provides current information and findings for these key markets based on the International Trade Administration's (ITA) 2000 through 2002 surveys of International Air Travelers to the U.S.

In 2002, the State of Washington ranked 15th among states in overseas arrivals; tied with Michigan and flanked by Colorado and Ohio. Washington's market share was 1.9% of all overseas arrivals to the U.S., slightly higher than 2001. Total visitation in 2002 amounted to 363,000 visitors, down 8% from 2001's 393,000 visitors. Air travelers from Mexico and Canada were not included.

Table 1
Overseas Visitors to Washington and to the U.S., 2002
Selected Countries of Origin

Country of Origin	Washington			United States		
	Number (000)	Percent	Rank	Number (000)	Percent	Rank
Japan	87	24	1	3,627	19	2
United Kingdom	50	14	2	3,817	20	1
Australia/New Zealand	24	7	3	517	3	4
Germany	21	6	4	1,190	6	3
Taiwan	14	4	5	288	2	13
Scandinavia	11	3	6	500	3	8
France	10	3	7	734	4	4
Benelux	7	2	8	553	3	6
<i>Total these countries</i>	224	62	--	11,226	59	--
Other countries	139	38	--	7,891	41	--
Washington Total	363	--	--	19,117	--	--

Excludes Canada and Mexico

Source: United States; ITA, Office of Travel and Tourism Industries, May 2003
Washington – Japan; ITA, Office of Travel and Tourism Industries, May 2003
Washington – Other than Japan; CIC Research, Custom Report, April 2003

As previously mentioned, a few key markets tend to provide most of Washington's overseas travelers. In 2002, five countries provided half of all overseas visitors to the state. That is Japan, the United Kingdom, Australia, New Zealand, and Germany, which combined, accounted for 50% of all overseas travelers. And eight counties (as shown in Table 1) accounted for six of ten visitors.

Other countries with a smaller number of travelers to Washington which are not reported here include: Argentina, Brazil, Italy, Spain, Switzerland, South Africa, South Korea, Peoples Republic of China, Hong Kong, India, Malaysia, Philippines, Singapore, Thailand, and Indonesia.

Leisure and Business Travelers

Sample

To provide valid sample size, three years data (2000 – 2002) were combined (see Table 2). Even with three year's combined sample, four out of the top eight countries providing travelers to Washington had small sample sizes.

Results for these four countries (Germany, Scandinavia, France, and Benelux) should be interpreted with caution.

Table 2
Washington Overseas Traveler Sample Size

Country	Respondents
Taiwan.....	462
Australia/New Zealand.....	259
Japan Leisure.....	231
Japan Business	213
United Kingdom	155
France.....	42*
Germany	80*
Scandinavia	29*
Benelux.....	29*

Source: CIC Research, Inc.

*** Small sample size**

Leisure and Business travelers included in the sample entered the U.S. via commercial airline and indicate that they would visit the State of Washington during their trip. However, a significant portion of leisure travelers to the State of Washington also traveled to other states. Therefore, variables like activities, lodging, and expenditures may pertain to other locations as well as to the State of Washington.

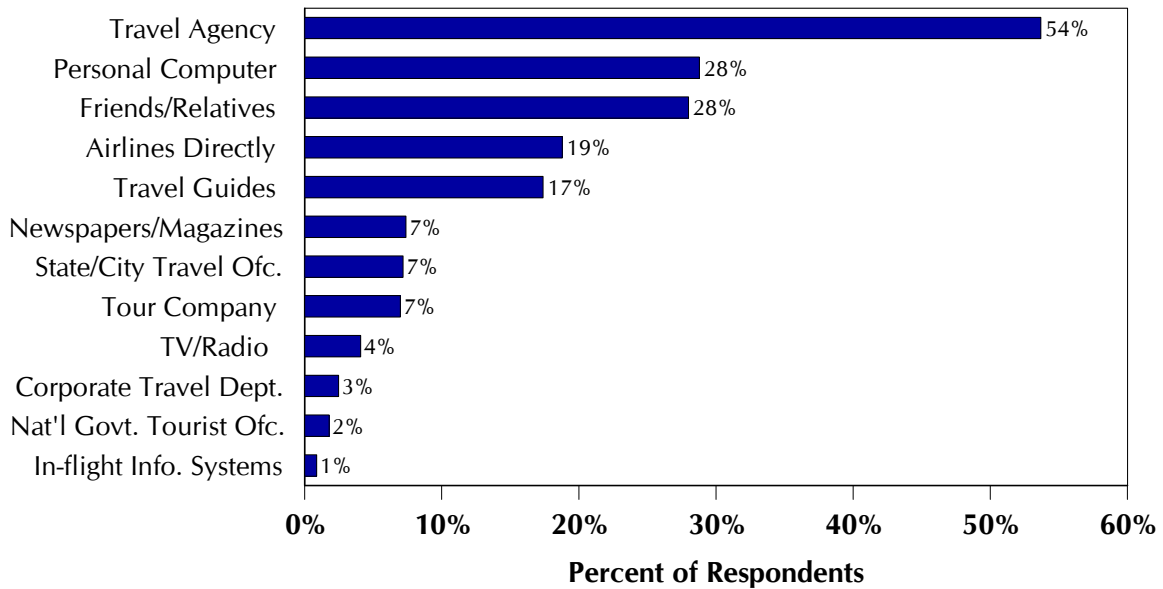
- **Leisure visitors:** those on a vacation and/or visiting friends or relatives. The findings represented a broad range of overseas leisure visitors to Washington, ranging from those bound primarily to the state to those who were merely passing through.
- **Business visitors:** included those on a business or professional trip or attending a convention or professional conference who visited Washington. With business travelers, most indicated that Washington was their primary destination.

It is important to keep these points in mind when reviewing the country discussions that appear in Section III. The mix of business and leisure travelers for a particular country can strongly influence the overall appearance of that country's visitors to Washington.

Information Sources used by Overseas Travelers

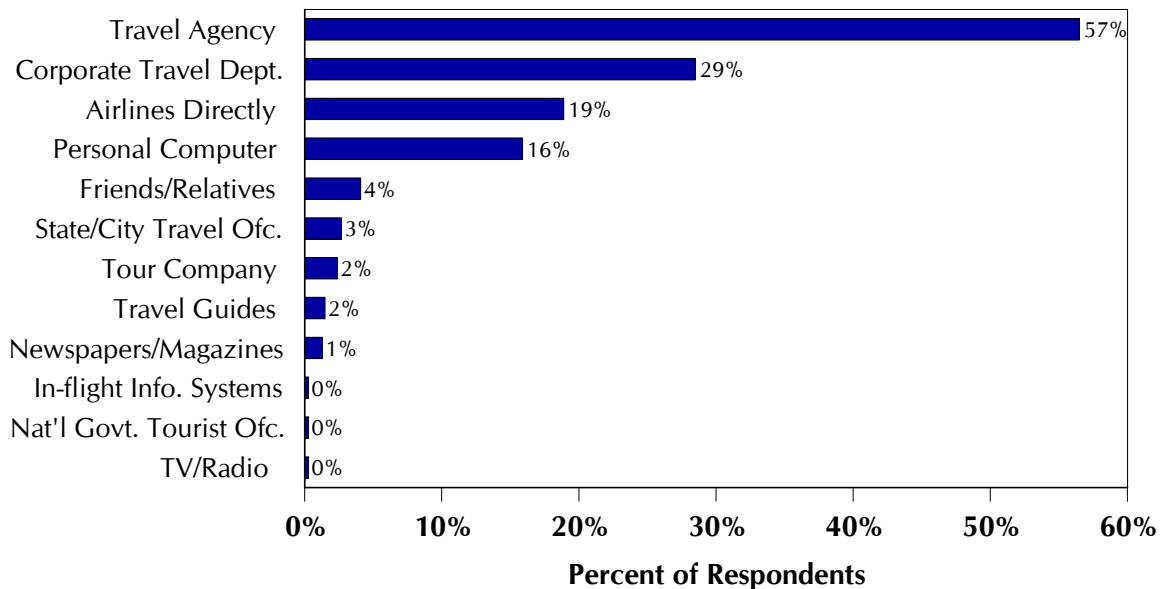
- **Leisure travelers** to Washington continued to rely on travel agencies in 2000–2002. They were twice as likely to use a travel agent for their information as any other source. While still the most important source of information, use of a travel agency has consistently declined over the past five years.
- Personal computer use (i.e., the Internet) is now the second most important information source for leisure travelers. Nearly a third of leisure travelers used the Internet for travel information, a significant increase from previous years.
- Friends and relatives are a consistently used source for information for leisure travelers. Nearly a third of travelers used a friend and/or relative in the country of their residence or the U.S. This proportion has remained relatively stable over the past several years.
- **Business travelers**, similar to leisure travelers, relied on travel agencies as their primary source for travel information in 2000–2002.
- A third used their corporate travel department, similar to previous years.
- Contrary to leisure travelers, few business travelers used friends and relatives for information and fewer used a personal computer (i.e., the Internet) as a source of information. Business travelers were more likely to contact an airline directly than were leisure travelers.

Figure 1
Leisure Travel Information Sources
(Multiple Responses)



n = 1,014; Overseas and Mexico Leisure Travelers who visited Washington, 2000-2002
Source: CIC Research, Inc.

Figure 2
Business Travel Information Sources
(Multiple Responses)

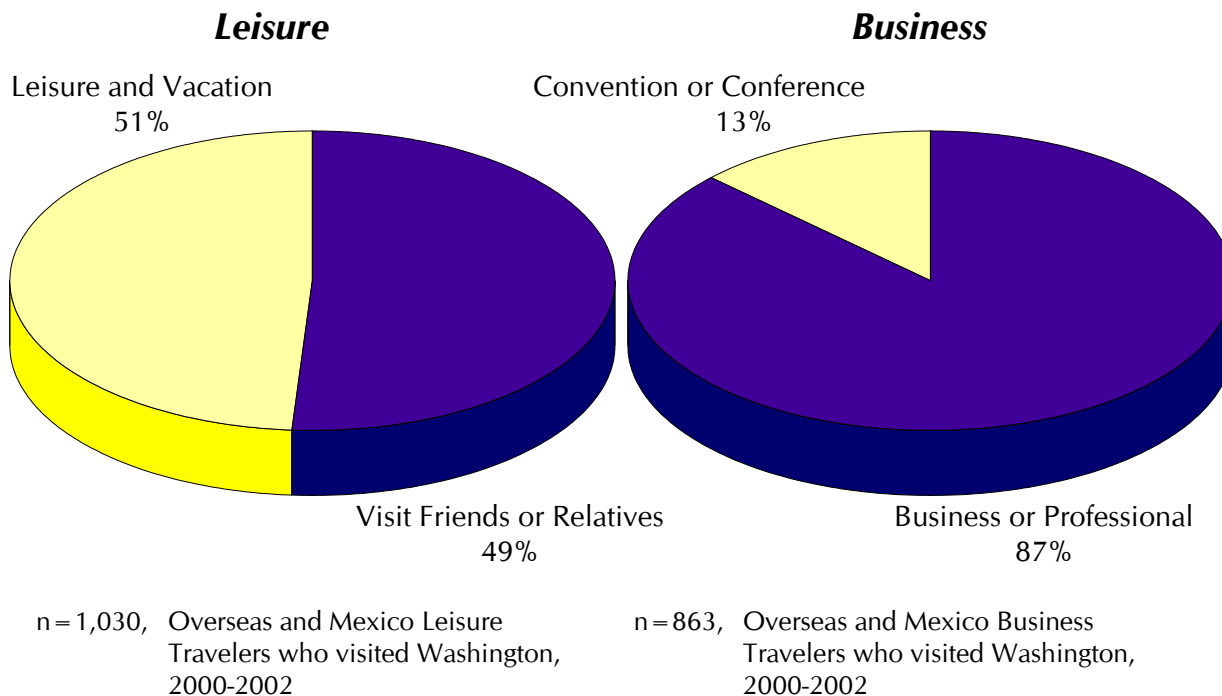


n = 855; Overseas and Mexico Business Travelers who visited Washington, 2000-2002
Source: CIC Research, Inc.

Primary Purpose of Trip and Destination

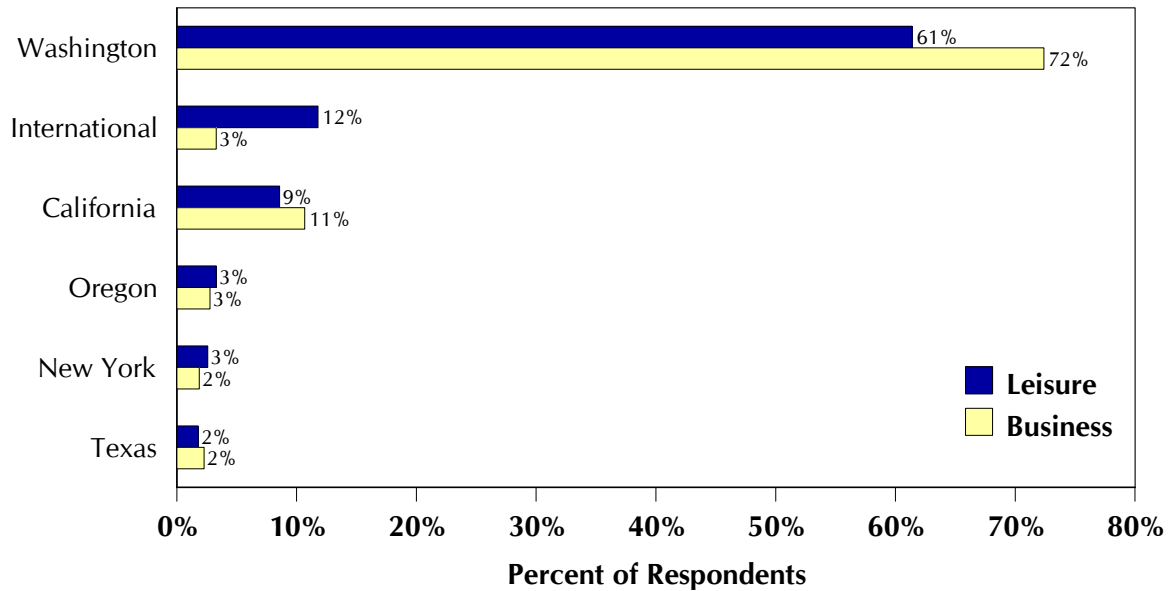
- **Leisure travelers** to Washington were evenly divided between vacation trips (51%) and visits to friends or relatives (49%).
- Most overseas leisure visitors to Washington had visited the U.S. previously (80%) with an average number of trips to the U.S. during the previous 12 months of 1.7. And an average of five trips during the previous five years.
- **Business travelers** were typically in Washington for a business or professional trip (87%). A minority was there to attend a convention or a conference (13%).
- Nearly all overseas business travelers to Washington had visited the U.S. previously (93%). They average twice the number of trips over the previous 12 months and five years as leisure travelers (3.3 and 11 respectively).

Figure 3
Main Purpose of Trip



Source: CIC Research, Inc.

Figure 4
Main Destinations



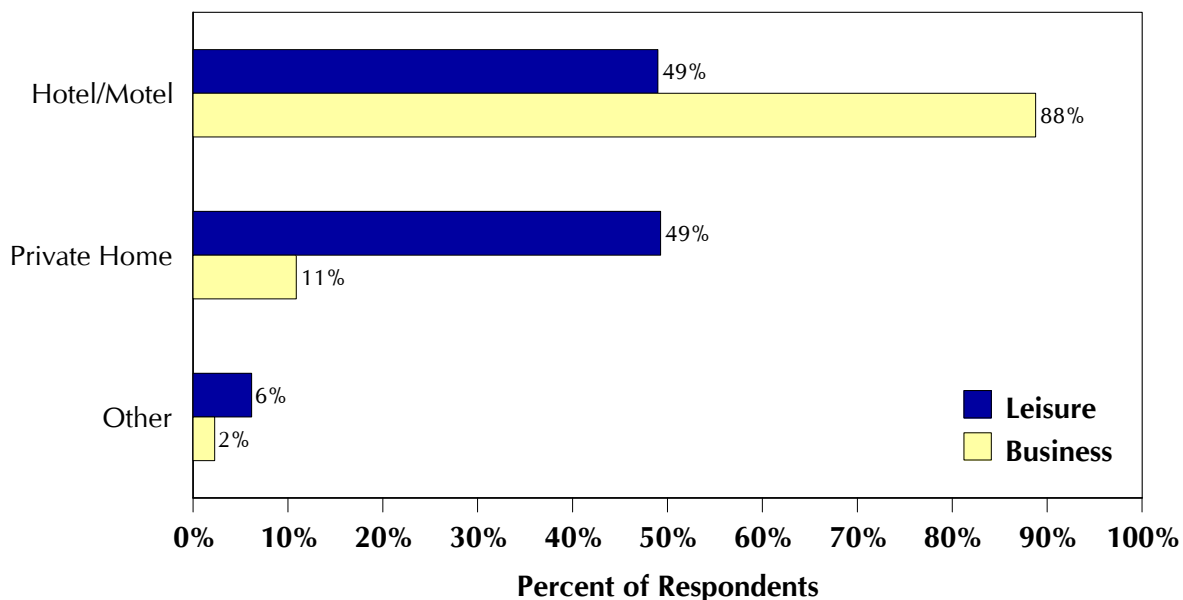
n = 693 (Leisure), Overseas and Mexico Leisure Travelers who visited Washington, 2000-02
n = 627 (Business), Overseas and Mexico Business Travelers who visited Washington, 2000-02

Source: CIC Research, Inc.

Accommodations

- Nearly two-thirds of all overseas visitors to Washington used commercial lodging (64%) in 2000-2002, a third stayed at a private home and the remainder (6%) used "other" accommodations.
- **Leisure visitors** were as likely to stay in a private home (49%) as a hotel or motel (49%). Six percent chose "other" accommodations, which were primarily camping.
- **Business visitors** are more likely to choose commercial lodging (89%). Very few stay in a private home or "other" accommodations.

Figure 5
Lodging/Accommodations



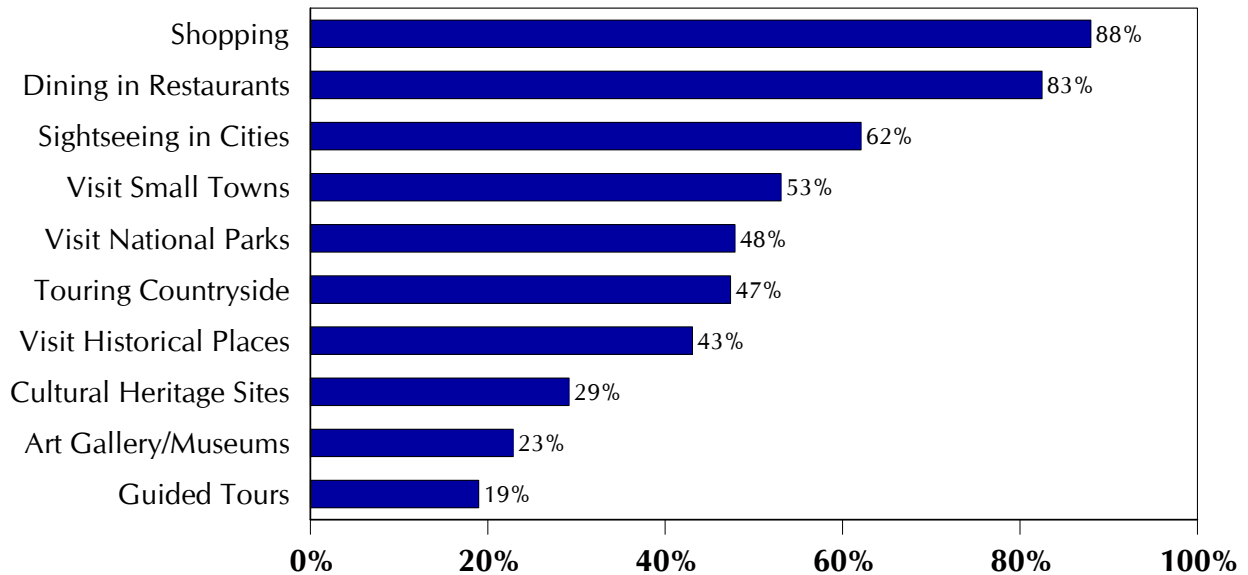
n = 827 (Leisure), Overseas and Mexico Leisure Travelers who visited Washington, 2000-02
 n = 714 (Business), Overseas and Mexico Business Travelers who visited Washington, 2000-02
 Source: CIC Research, Inc.

Activities

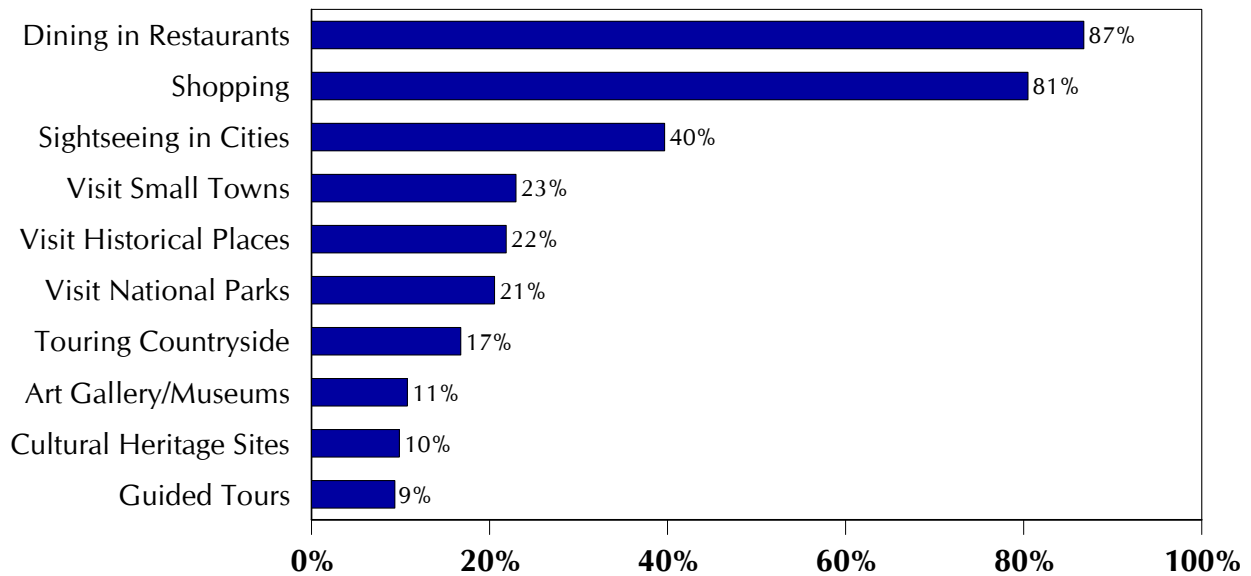
- Shopping and dining were the most common activities for both overseas leisure and business visitors to Washington. Similar proportions of each type said they had dined and shopped while in Washington.
- **Leisure visitors** were more likely to undertake a variety of activities. For example, about half or more went sightseeing in the city (i.e., Seattle), visited small towns, visited Olympic National Park, and toured the Washington countryside.
- Around a third of leisure visitors to Washington visited one or more of the state's historical, cultural, and heritage sites. The top ten activities for visitors are illustrated in Figure 6 and the complete list for both leisure and business visitors are presented in Table 3.
- **Business visitors** were unlikely to undertake very many activities other than dining and shopping. Four in ten went sightseeing in the city (i.e., Seattle), but less than a quarter said they had done any other activity.

Figure 6
Top Activities

Leisure Visitors



Business Visitors



Percent of Respondents (Multiple Responses)

n = 973 (Leisure), Overseas and Mexico Leisure Travelers who visited Washington, 2000-02
n = 795 (Business), Overseas and Mexico Business Travelers who visited Washington, 2000-02
Source: CIC Research, Inc.

Table 3
Activities, Leisure and Business Visitors

	<i>Leisure</i>	<i>Business</i>
Amusement/Theme Parks.....	27%	15%
Art Gallery/Museums	23%	11%
Attend Sports Event.....	13%	8%
Camping/Hiking	15%	3%
Casinos/Gambling	14%	6%
Concert/Play/Musical	14%	6%
Cruises.....	12%	3%
Cultural Heritage Sites	29%	10%
Dining in Restaurants.....	83%	87%
Eco. Excursions.....	12%	3%
Ethnic Heritage Sites	9%	4%
Golfing/Tennis.....	8%	5%
Guided Tours.....	19%	9%
Hunting/Fishing	3%	2%
Nightclubs/Dancing.....	12%	12%
Ranch Vacations	4%	0%
Shopping	88%	81%
Sightseeing in Cities.....	63%	40%
Snow Skiing.....	4%	3%
Touring Countryside	47%	17%
Visit American Indian Comm.....	11%	6%
Visit Historical Places	43%	22%
Visit National Parks.....	48%	21%
Visit Small Towns	53%	23%
Water Sports/Sunbathing.....	16%	4%

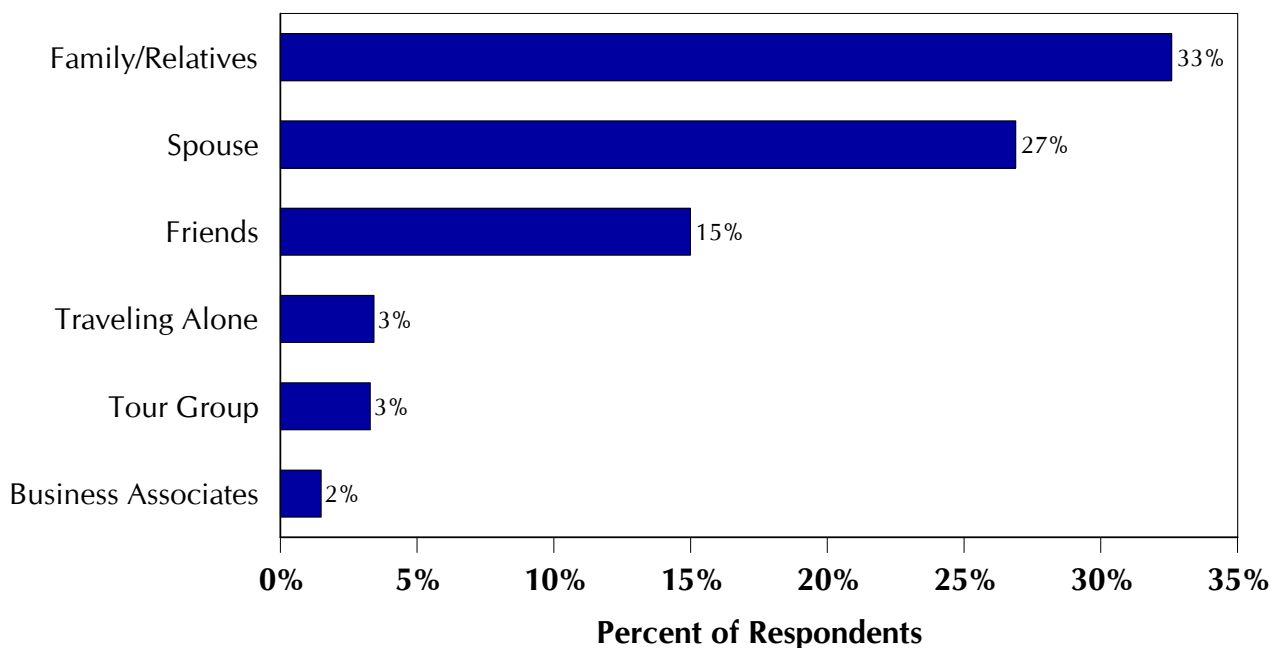
n = 973 (Leisure), Overseas and Mexico Leisure Travelers who visited Washington, 2000-02
n = 795 (Business), Overseas and Mexico Business Travelers who visited Washington, 2000-02

Source: CIC Research, Inc.

Travel Parties

- **Leisure visitors** were most likely to travel with a spouse and/or family member(s). Nearly two thirds traveled with a spouse or family companion.
- One third said they traveled alone, a significantly higher proportion than domestic travelers.
- One in ten leisure visitors traveled with children.
- **Business visitors** tended to travel alone (53%) or with a business associate (31%).
- The average leisure travel party included 1.7 people, while business travel parties were slightly smaller at 1.3.

Figure 7
Travel Companions
Leisure Visitors, Multiple Responses

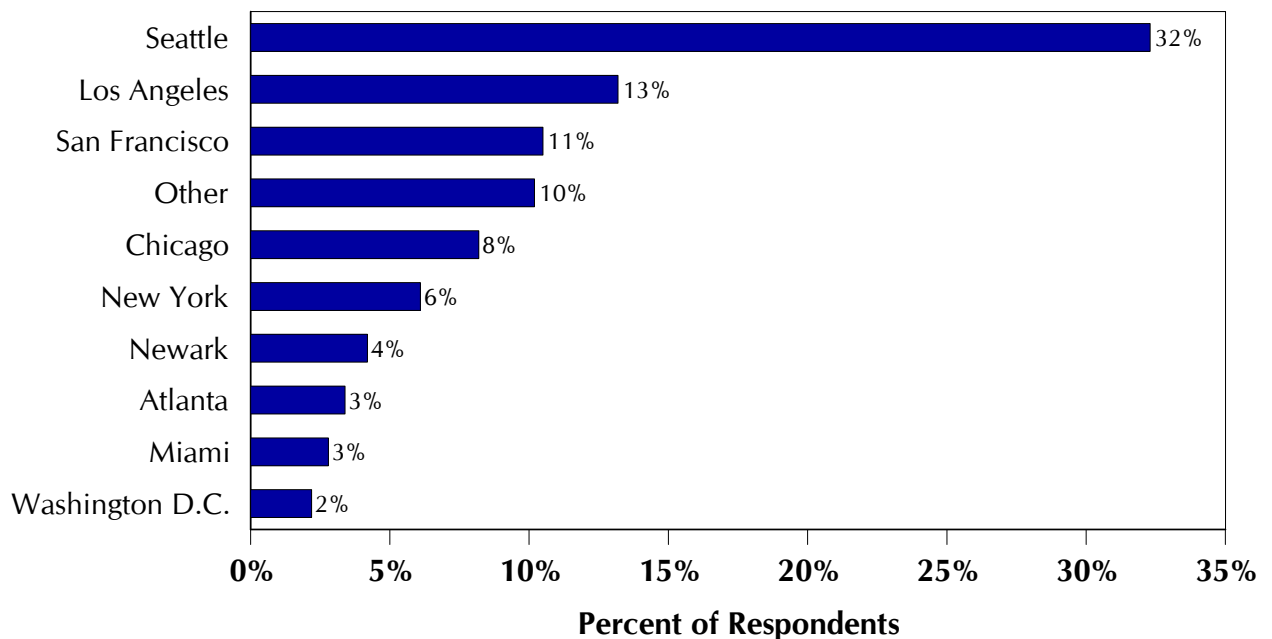


n = 1,013; Overseas and Mexico Leisure Travelers who visited Washington, 2000-2002
Source: CIC Research, Inc.

Port of Entry

- Seattle was the most common port of entry for Washington's overseas visitors with a third saying they entered there.
- Two thirds of travelers to Washington said they arrived at entry ports outside the state, which shows the extent to which travelers visited other states or Canada as part of their travel.
- Two thirds of Washington's overseas visitors arrived via West Coast ports, which included Los Angeles, San Francisco, and Portland. The other third came in through the east coast, including Chicago, New York, Miami, and Washington D.C.
- Overseas leisure and business visitors reported similar ports of entry and the overall proportions shown below represent both types accurately.

Figure 8
Port of Entry (Top 10)
All Overseas Visitors

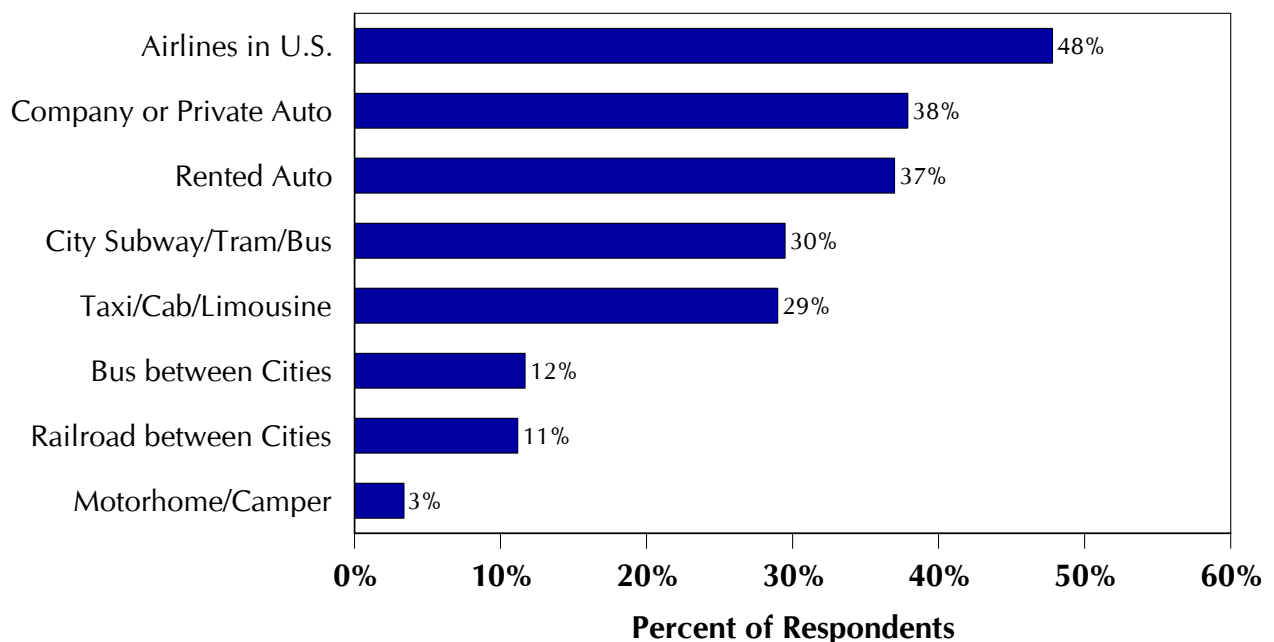


n = 2,146; Overseas and Mexico Travelers who visited Washington, 2000-2002
Source: CIC Research, Inc.

Mode of Transportation

- Nearly half of all leisure travelers to Washington used air travel *within* the U.S. This proportion has increased steadily over the past five years and continues to relate to the use of various ports of entry and travel to multiple destinations.
- Three quarters of leisure visitors (75%) used either a private or rented auto, while another third used a taxi or limo. A third also used public transportation within Seattle.
- Business visitors were more likely to use air travel within the U.S., a taxi or limo and a rented car, but less likely to use a private car or public transportation than leisure travelers.
- Few visitors, leisure or business, used a bus, railroad, motorhome or camper.

Figure 9
Transportation in the U.S.
Leisure Visitors, Multiple Responses



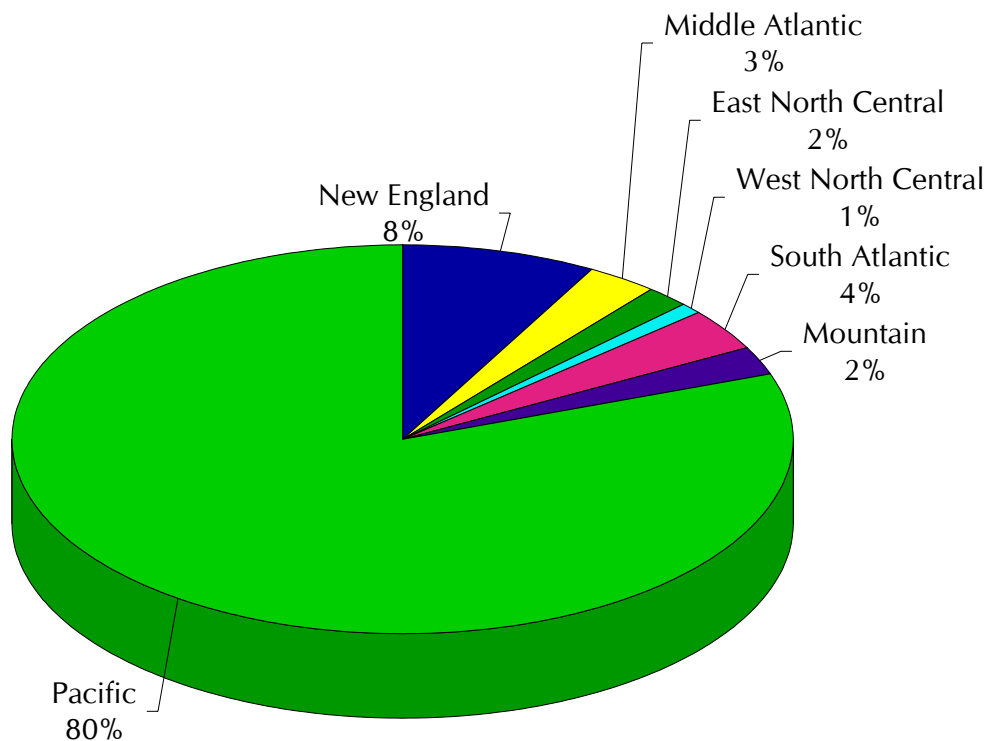
n = 944; Overseas and Mexico Leisure Travelers who visited Washington, 2000-2002
Source: CIC Research, Inc.

Travel in the U.S.

Main Destination

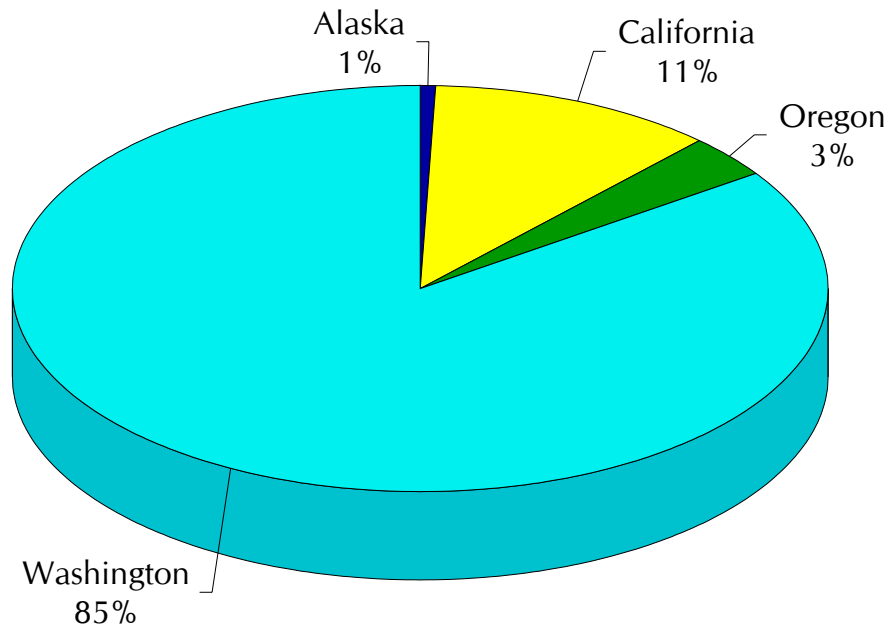
- Eight of ten Washington visitors (80%) visited only west coast locations, i.e., the Pacific Region. For these Pacific Region visitors, Washington was the main destination for 70%.
- California was the next most common main destination, representing about one in ten total Washington visitors and 11% of Pacific Region only visitors.
- Leisure and business visitor's main destinations were quite similar in 2000-2002.
- Overall length of stay in the U.S. averaged 21 nights in 2000-2002, down slightly from 23 in the 1999 study. Visitors spend about half their overall average at their primary destination (10 nights).

Figure 10
Main Destination by U.S. Regions
All Overseas Visitors



n = 2,144; Overseas and Mexico Travelers who visited Washington, 2000-2002
Source: CIC Research, Inc.

Figure 11
Main Destination, Pacific Region
Overseas Visitors Pacific Region Only

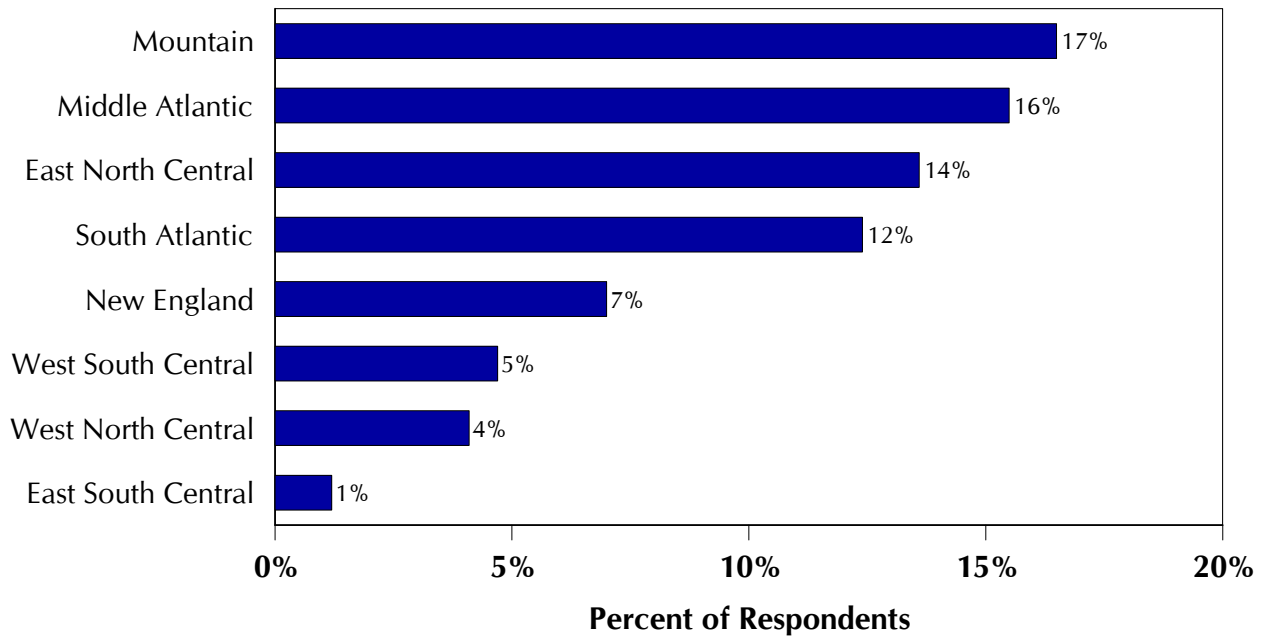


n = 1,715; Overseas and Mexico Travelers who visited Washington and said the Pacific Region was their "Main Destination," 2000-2002
Source: CIC Research, Inc.

Other U.S. Destinations Visited

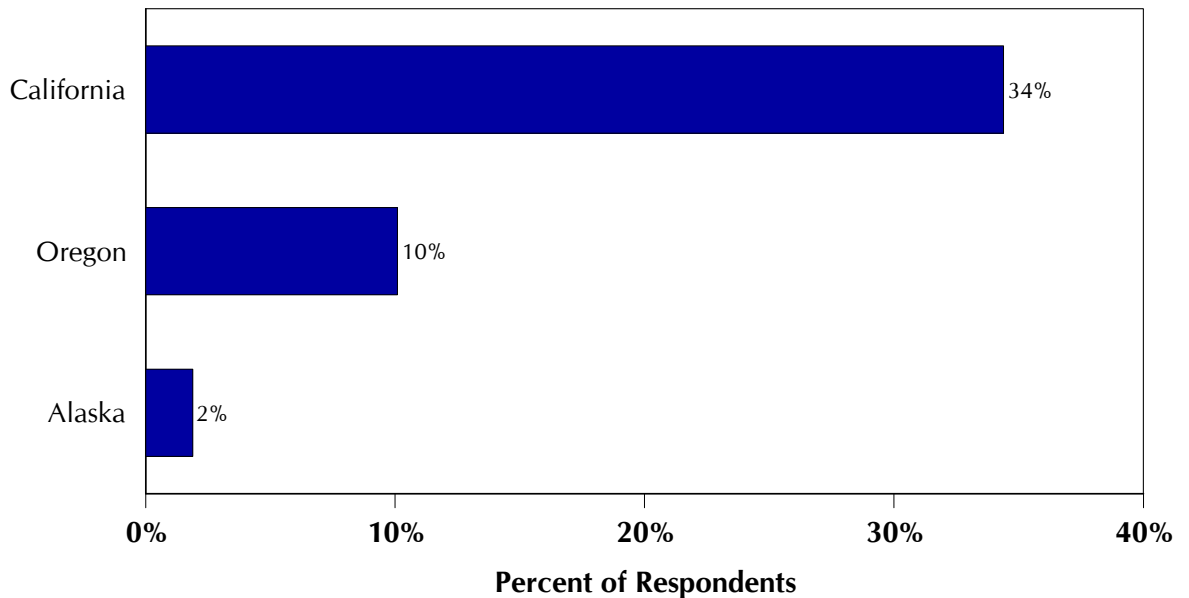
- Washington's overseas visitors who traveled to regions other than the Pacific most likely visited the Middle Atlantic or Mountain. Within the Middle Atlantic, the primary destination was New York City attracting 13% of Washington's overseas visitors. Within the Mountain Region, it was Las Vegas with 7%.
- Overall, states within the Pacific Region were most attractive as secondary destinations for Washington's overseas visitors. California continues to be the most common secondary destination attracting 34%.
- Smaller portions of Washington overseas travelers visited an eastern location, with the South Atlantic, which included Florida (4%) and Washington D.C. (5%) the most popular.

Figure 12
U.S. Regions Visited, Other than Pacific
All Overseas Visitors, Multiple Responses



n = 2,146; Overseas and Mexico Travelers who visited Washington 2000-2002
Source: CIC Research, Inc.

Figure 13
Pacific Region States Visited
All Overseas Visitors, Multiple Responses

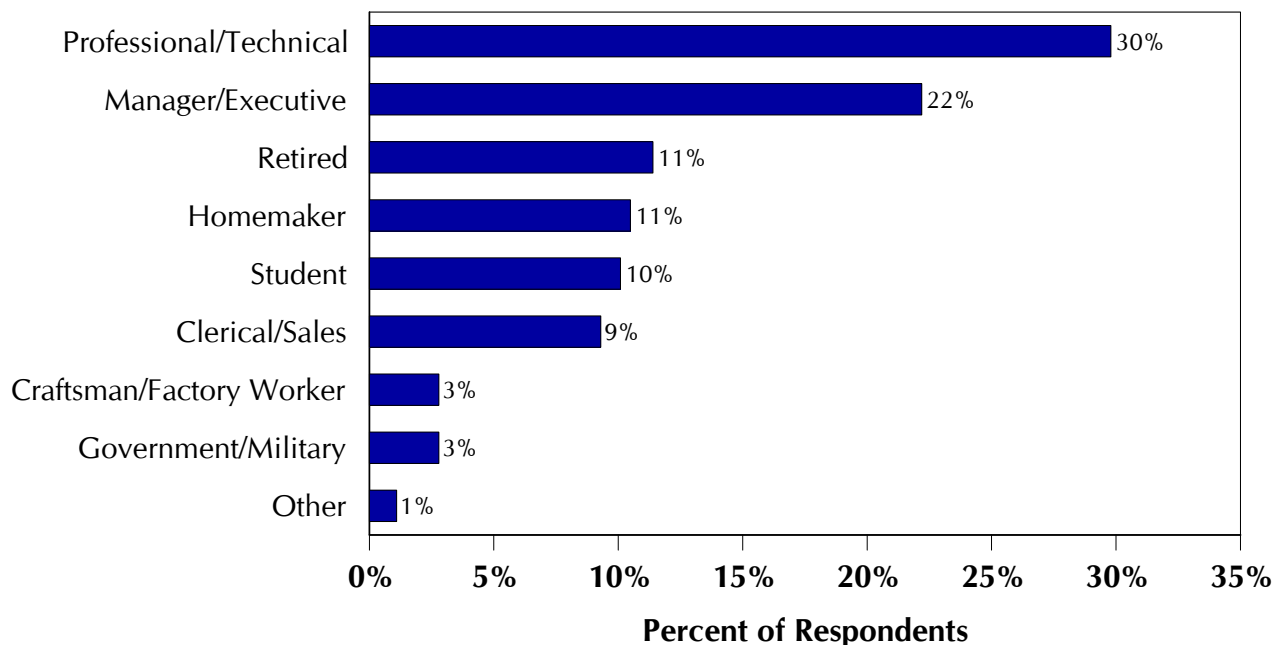


n = 2,146; Overseas and Mexico Travelers who visited Washington 2000-2002
Source: CIC Research, Inc.

Demographics

- The average age of overseas leisure travelers to Washington was 42 years for males and 40 years for females. Business travelers tended to be slightly younger (41 and 38 years respectively).
- Relatively few overseas visitors were age 65 or older (4% for males and 1% for females), illustrating how overseas travelers tended to be younger than domestic travelers, many of who are of retirement age.
- The median income of overseas leisure travelers was \$49,200 in 2000–2002, with business travelers significantly higher at \$76,700.
- Half of overseas leisure travelers to Washington worked in a professional or technical capacity or were executives or managers, occupations that are consistent with the high median income.
- About one in ten were retired, a homemaker or a student.

Figure 14
Occupation
Overseas Leisure Travelers



n = 981; Overseas and Mexico Leisure Travelers who visited Washington 2000-2002
Source: CIC Research, Inc.

Expenditures

- Overseas leisure visitors to Washington spent an average of \$2,432 in the U.S. during their 2000–2002 trip, down slightly from 1999–2000. Average reported daily expenditures per person were \$73. These amounts do not include air travel to and from the U.S.

Country Reports

This section updates a selection of countries that represent Washington’s primary overseas markets. Each country report provides detail about travelers and travel characteristics, as well as additional interpretive comments offering insights and comparisons. The country reports concentrate on those countries – or combinations of countries such as with the four countries combined as Scandinavia – for which the in-flight data are adequate for analysis. While residents of many other countries not included here also travel to Washington, the number of cases in the in-flight database is not sufficient to provide reliable findings.

AUSTRALIA/NEW ZEALAND

Sample	<ul style="list-style-type: none">• 259	
Statistics	<ul style="list-style-type: none">• U.S. visitors 2002: 517,000 (combined rank 4th)• Washington visitors 2002: 24,000 (Washington rank 3rd, market share 7%)• Composition: Australia 77%, New Zealand 23%	
Profile	<ul style="list-style-type: none">• Have previously visited the U.S.: 78%• Main ports of entry: Los Angeles 67%, San Francisco 9%• Main destinations visited: Washington 52%, Canada 14%, California 10%• Average number of states visited: 2.9• Other states visited: California 59%, New York 20%, Nevada 14%, Oregon 13%, Florida 9%• Main purpose of trip: vacation/pleasure 63%, business/convention 37%• Type of accommodation: hotel/motel 62%, private home 38%, other 3%• Average length of stay in the U.S.: 30 nights• Travel party composition: adults 94%, with children 6%• Average party size: 1.5 people• Average age: men 42, women 41• Average expenditure in U.S.: \$2,932 per party per trip; \$65 per visitor per day• Median annual income: \$51,700	
Insights	<ul style="list-style-type: none">• Nearly three quarters (72%) use a travel agency as information source, and 20% rely on friends/relatives• High percentage users of travel packages (13%), after Benelux (22%)• Nearly two thirds (63%) traveling for leisure; among the most likely to be traveling with a spouse (31%)• Longest average length of stay (30 nights)• The least likely to report Washington as their main U.S. destination (47%)• One quarter (24%) are first-time U.S. visitors, most for any country	<ul style="list-style-type: none">• Three quarters (72%) use a port of entry in California, mainly Los Angeles (67%); only 1% arrive in Seattle• Highest reported incidence of sightseeing in cities (65%), visiting an historic place (56%), visiting a small town (56%), and purchasing a guided tour (31%)• Most likely to attend a sporting event (25%)• Most likely to ski (16%)• Expenditures are below average at \$65 per person per day• Median income (\$51,700) is above average for Washington leisure travelers (\$49,200)

BENELUX (BELGIUM, NETHERLANDS, LUXEMBOURG)

Sample	<ul style="list-style-type: none">• 29 – <i>Small Sample</i>		
Statistics	<ul style="list-style-type: none">• U.S. visitors 2002: 553,000 (combined rank 6th)• Washington visitors 2002: 7,000 (Washington rank 8th, market share 2%)• Composition: Belgium 24%, Netherlands 75%, Luxembourg 2%		
Profile	<ul style="list-style-type: none">• Have previously visited the U.S.: 88%• Main ports of entry: Seattle 16%, Washington D.C. 13%, San Francisco 18%• Main destinations visited: Washington 97%• Average number of states visited: 3.2• Other states visited: California 34%, Oregon 10%, Nevada 30%, Idaho 21%, Wyoming 12%, Texas 12%• Main purpose of trip: vacation/pleasure 57%, business/convention 43%• Type of accommodation: hotel/motel 81%, private home 27%, other 22%• Average length of stay in the U.S.: 25 nights• Travel party composition: adults 96%, with children 4%• Average party size: 1.9 people• Average age: men 40, women 44• Average expenditure in U.S.: \$2,829 per party per trip; \$60 per visitor per day• Median annual income: \$58,800		
Insights	<table><tr><td><ul style="list-style-type: none">• Most likely to use a travel agent for trip planning (61%)• Among most likely to be repeat visitors (88%), averaging 2.3 visits during the previous 12 months and 6 trips during the previous five years• Most likely to rent an auto (83%)• Report fewer activities than most visitors; primary emphasis on dining (92%), shopping (85%), and visiting national parks (73%) and small towns (83)</td><td><ul style="list-style-type: none">• The most likely, along with Germans, to visit an American Indian site (25%)• Three quarters (76%) are occupied in professional, technical or managerial professions, among the highest of any country• Total trip expenditures while in the U.S. are about average, amounting to \$2,829 per party per trip; daily expenditures are also average at \$60 per person per day</td></tr></table>	<ul style="list-style-type: none">• Most likely to use a travel agent for trip planning (61%)• Among most likely to be repeat visitors (88%), averaging 2.3 visits during the previous 12 months and 6 trips during the previous five years• Most likely to rent an auto (83%)• Report fewer activities than most visitors; primary emphasis on dining (92%), shopping (85%), and visiting national parks (73%) and small towns (83)	<ul style="list-style-type: none">• The most likely, along with Germans, to visit an American Indian site (25%)• Three quarters (76%) are occupied in professional, technical or managerial professions, among the highest of any country• Total trip expenditures while in the U.S. are about average, amounting to \$2,829 per party per trip; daily expenditures are also average at \$60 per person per day
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FRANCE

- Sample**
- 42 – *Small Sample*
- Statistics**
- U.S. visitors 2002: 734,000 (rank 4th)
 - Washington visitors 2002: 10,000 (Washington rank 7th, market share 3%)
- Profile**
- Have previously visited the U.S.: 78%
 - Main ports of entry: Boston 18%, Chicago 35%, Detroit 8%, Seattle 8%
 - Main destinations: Washington 87%
 - Average number of states visited: 3.0
 - Other states visited: California 41%, Arizona 18%, Nevada 20%, Louisiana 18%, Washington D.C 14%, Oregon 30%
 - Main purpose of trip: vacation/pleasure 66%, business/convention 34%
 - Type of accommodation: hotel/motel 68%, private home 28%, other 11%
 - Average length of stay in the U.S.: 19 nights
 - Travel party composition: adults 96%, with children 4%
 - Average party size: 1.8 people
 - Average age: men 49, women 35
 - Average expenditure in U.S.: \$2,520 per party per trip; \$77 per visitor per day
 - Median annual income: \$49,300
- Insights**
- Most likely to be on a vacation and least likely to be on a business trip (34%)
 - Least likely, other than Japanese business travelers, to travel with children (4%)
 - The second most likely to report Washington as their main U.S. destination (87%)
 - Among the least likely to arrive in Seattle (8%)
 - More common use of hotels than most visitors (68%)
 - Most likely to gamble (20%)
 - Average 3.4 U.S. trips in previous 12 months and 10 in past 5 years, second highest after Japanese business
 - Most likely to rely on friends and relatives for travel information (25%); the least likely to use a tour company (0.3%)
 - Highest proportion of retired travelers (24%), the lowest proportion of professional/technical (12%)

GERMANY

Sample • 80 – *Small Sample*

Statistics • U.S. visitors 2002: 1,190,000 (rank 4th)
• Washington visitors 2002: 21,000 (Washington rank 4th, market share 6%)

Profile • Have previously visited the U.S.: 78%
• Main ports of entry: Seattle 16%, Chicago 25%, San Francisco 14%, Washington D.C. 11%
• Main destinations: Washington 75%, California 6%
• Average number of states visited: 2.8
• Other states visited: California 47%, Nevada 11%, Oregon 16%, Montana 14%, Wyoming 12%, Washington D.C. 11% Arizona 7%, New York 6%
• Main purpose of trip: vacation/pleasure 77%, business/convention 23%
• Type of accommodation: hotel/motel 52%, private home 44%, other 17%
• Average length of stay in the U.S.: 16 nights
• Travel party composition: adults 92%, with children 8%
• Average party size: 1.8 people
• Average age: men 39, women 40
• Average expenditure in U.S.: \$3,486 per party per trip; \$89 per visitor per day
• Median annual income: \$57,800

Insights • Germans, like Australians, and French are most likely to visit a number of other states during their visit (2.8 average)
• The most likely to be first-time U.S. visitors (23%), along with France (23%) and Australia/New Zealand (22%)
• The majority travel independently and are the least likely to use travel packages (5%)
• One of the highest users of rental cars (68%)
• Relatively few parties with children (8%)
• Among the most likely to be on a vacation (77%)

• Most likely to camp/hike (35%), and among the most likely to visit national parks (57%); among the least likely to report shopping (77%) and least often to report sightseeing in cities (36%)
• Take responsibility for planning their own trips, with one of the lowest reliance on travel agents (50%) or airlines (14%) and the highest reliance on state/city travel offices (31%) and the Internet (29%); highest use of TV and radio for trip planning information (3%)
• Plan their trips well in advance, making the advance trip decision an average of 102

JAPAN

Sample

- Leisure 231, Business 213

Statistics

- U.S. visitors 2002: 3,627,000 (rank 2nd)
- Washington visitors 2002: 87,000 (Washington rank 1st, market share 24%)

Profile

Leisure Travel

- Previously visited the U.S.: 79%
- Main ports of entry: Seattle 61%, Los Angeles 7%, San Francisco 10%
- Main destinations: Washington 74%, California 5%, Canada 8%
- Average number of states visited: 1.9
- Other states visited: California 29%, Nevada 8%, New York 11%, Florida 5%
- Type of accommodation: hotel/motel 62%, private home 40%
- Average length of stay in the U.S.: 9 nights
- Travel party composition: adults 90%, with children 10%
- Average party size: 1.6 people
- Average age: men 46, women 39
- Average expenditure in U.S.: \$1,675 per party per trip; \$112 per visitor per day
- Median annual income: \$70,600

Business Travel

- Previously visited the U.S.: 92%
- Main ports of entry: Seattle 63%, San Francisco 129%, Los Angeles 11%
- Main destinations: Washington 62%, California 15%
- Average number of states visited: 2.0
- Other states visited: California 39%, New York 7%
- Type of accommodation: hotel/motel 92%, private home 8%
- Average length of stay in the U.S.: 11 nights
- Travel party composition: adults 98%, with children 2%
- Average party size: 1.4 people
- Average age: men 42, women 41
- Average expenditure in U.S.: \$2,593 per party per trip; \$169 per visitor per day
- Median annual income: \$88,100

Insights, Business and Leisure Travelers

- Make trip decisions close to departure, 65 days for leisure travelers and 27 days for business travelers
- Leisure visitors are the most likely to rely on information from friends or relatives for trip planning (31%) and are the heaviest users of tour operators for this purpose (10%); 47% use a travel agent.
- Japanese leisure travelers are the heaviest users of computers for trip planning: 32%
- Leisure travelers are often traveling with relatives (37%), friends (17%) or a spouse (17%); average travel party size is among the highest at 1.6
- Six in ten leisure and business travelers use Seattle as a gateway (61% and 63% respectively), by far the highest proportions of any overseas travelers
- About three quarters of Japanese leisure and two thirds of business travelers report Washington as their primary U.S. destination
- Relatively few (8%) of Japanese business travelers are first-time U.S. visitors; leisure visitors are much more likely to be first time (21%), the average was 16%
- Females constitute about half of Japanese leisure travelers (45%), higher than any country except Benelux and significantly higher than the overall average
- Both leisure and business travelers have short stays (averaging 10 days in the U.S. half of the overall average) and visit relatively few states (2), consistent with relatively short, focused trips
- Leisure travelers are relatively likely to stay in private homes (40%) and are the most likely to visit friends and relatives (52%)
- Few Japanese leisure travelers travel with children (10%)
- Leisure travelers are particularly oriented to shopping (86%) and sightseeing in cities (74%), but overall their itinerary is more limited than most overseas travelers, reflecting their shorter average length of stay
- Business travelers emphasize dining (89%) and shopping (87%), with relatively little sightseeing (35%); most likely to play golf (10%)
- Japanese business travelers had the highest average daily trip expenditures, \$169 per visitor/day, Japanese leisure travelers expenditures (\$112) were second highest, median income for leisure travelers is well above average at \$70,600, median income for business travelers at \$88,100 was second highest trailing Scandinavia (\$120,500)
- Leisure travelers include the highest proportion of retail/sales employees (12%) and homemakers (11%) and the lowest proportions of managers (19%)
- The majority (81%) of business travelers work in managerial, professional or technical occupations

SCANDINAVIA (DENMARK, FINLAND, NORWAY, SWEDEN)

Sample • 29 – *Small Sample*

Statistics

- U.S. visitors 2002: 500,000 (combined rank 8th)
- Washington visitors 2002: 11,000 (Washington rank 6th, market share 3%)
- Composition: Denmark 27%, Finland 7% Norway 32%, Sweden 34%

Profile

- Have previously visited the U.S.: 98%
- Main ports of entry: Newark 28%, Chicago 24%, Seattle 14%, New York 7%
- Main destinations: Washington 65%, California 5% and Europe 15%
- Average number of states visited: 1.8
- Other states visited: New Jersey 28%, Connecticut 16%, Texas 14%
- Main purpose of trip: vacation/pleasure 36%, business/convention 64%
- Type of accommodation: hotel/motel 81%, private home 19%
- Average length of stay in the U.S.: 10 nights
- Travel party composition: adults 93%, with children 7%
- Average party size: 1.4 people
- Average age: men 36, women 33
- Average expenditure in U.S.: \$1,375 per party per trip; \$100 per visitor per day
- Median annual income: \$120,500

Insights

- Least likely to use travel guides for trip planning (1%); high reliance on travel agents (70%) and corporate travel departments (41%)
- Among the least likely to use travel packages (8%)
- Among the least likely to list Washington as their main destination (65%), most likely to list International (27%)
- Among the most likely to visit New Jersey (28%) and Texas (14%)
- Among the most likely to travel with family (30%)
- The activities are average in most respects, although Scandinavians are the second most likely to attend sporting events (18%) but are least likely to shop (64%)
- Highest median annual income at \$120,500
- Average daily trip expenditures (\$100/person/day)

TAIWAN

Sample • 462

Statistics

- U.S. visitors 2002: 288,000 (rank 13th)
- Washington visitors 2002: 14,000 (Washington rank 5th, market share 4%)

Profile

- Have previously visited the U.S.: 86%
- Main ports of entry: Seattle 51%, San Francisco 18%, Los Angeles 17%
- Main destinations: Washington 64%, California 15%
- Average number of states visited: 2.1
- Other states visited: California 40%, Oregon 9%, New York 10%, Nevada 8%, Texas 5%
- Main purpose of trip: vacation/pleasure 54%, business/convention 46%
- Type of accommodation: hotel/motel 59%, private home 39%
- Average length of stay in the U.S.: 22 nights
- Travel party composition: adults 92%, with children 8%
- Average party size: 1.5 people
- Average age: men 41, women 36
- Average expenditure in U.S.: \$2,957 per party per trip; \$92 per visitor per day
- Median annual income: \$62,500

Insights

- Have the shortest trip planning time other than Japanese business and Korean travelers (41 days)
- Half (51%) arrive in Seattle, one of the highest proportion among overseas visitors
- Least likely to use a hotel or motel (58%) and among most likely to stay in a private home (39%)
- Among the most likely to list Washington as a primary destination (63%), and visit an average of only 2 states during their U.S. visit
- Among the most likely to take a cruise (13%) and shop (88%)
- Least likely to dine in a restaurant (74%), attend a nightclub (7%) tour the countryside (23%) or visit historic places (28%)
- Most travelers work in managerial, professional or technical occupations (67%)
- Among highest average expenditures per trip (\$2,957), and above average on a daily basis (\$92/person)
- Among the youngest of travelers (41 male, 36 female), with average median annual income (\$60,600)

UNITED KINGDOM

Sample	<ul style="list-style-type: none">• 155	
Statistics	<ul style="list-style-type: none">• U.S. visitors 2002: 3,817,000 (rank 1st)• Washington visitors 2002: 50,000 (Washington rank 2nd, market share 14%)	
Profile	<ul style="list-style-type: none">• Have previously visited the U.S.: 88%• Main ports of entry: Seattle 53%, Chicago 12%, San Francisco 6%• Main destinations: Washington 75%, California 6%, Canada 6%• Average number of states visited: 2.3• Other states visited: California 29%, Nevada 13%, Oregon 9%, Illinois 11%, New York 12%• Main purpose of trip: vacation/pleasure 65%, business/convention 35%• Type of accommodation: hotel/motel 65%, private home 34%, other 4%• Average length of stay in the U.S.: 16 nights• Travel party composition: adults 92%, with children 8%• Average party size: 1.6 people• Average age: men 42, women 43• Average expenditure in U.S.: \$2,141 per party per trip; \$82 per visitor per day• Median annual income: \$68,200	
Insights	<ul style="list-style-type: none">• The most likely among European travelers to arrive in Seattle (53%)• Shorter average U.S. stays than most other countries (16 days)• Trip expenditures in the U.S. are somewhat below average at \$1,900 per party per trip; average daily expenditures are about average (\$89)	<ul style="list-style-type: none">• The most likely to report dining in restaurants (96%), but below average with respect to shopping (82%)• More likely than most to visit national parks (38%) and take guided tours (182%)• The highest proportion of retired travelers (16%) other than for French

Methodology

Overseas

The overseas findings in this report are based on data gathered by the *Survey of International Air Travelers*, conducted by the U.S. International Trade Association (ITA). A custom data tabulation was prepared by CIC Research of San Diego, California. The data tabulation includes only overseas travelers to the U.S. who reported traveling to Washington as part of their trip. The data is a combined three-year period, January 2000 through December 2002.

Germany, Scandinavia, France, and Benelux respondents in the database contain small samples, and the results should be used with caution. The number of respondents for each country appears in Table 2-a. Note that the values for the individual countries listed include both leisure and business travelers. The breakouts between business and leisure overall, however, are based on all travelers to Washington, not just those from the countries listed.

Analysis for Japan is conducted separately for leisure and business travelers. These categories are not reported separately for the remainder of the countries due to limited sample size. Because business and leisure travelers typically have very different characteristics, the findings for these two Japanese travel categories are quite dissimilar and, accordingly, are not directly comparable with the findings for travelers from the other countries.

Each section profiling travelers from the eight selected counties includes highlight figures from the data provided in Appendix A. In some cases only a portion of the data for particular items are described, and in some cases the percentages provided do not total to 100%. Certain variables, such as accommodations and activities, are multiple responses totaling more than 100%.

Table 4
Washington Overseas Traveler Sample Size

Country	Respondents
Taiwan	462
Australia/New Zealand.....	259
Japan Leisure.....	231
Japan Business	213
United Kingdom	155
France.....	42*
Germany	80*
Scandinavia	29*
Benelux.....	29*

Source: CIC Research, Inc.

* Small sample size

This study avoids making direct comparisons between current findings and previous time periods due to sampling differences and data limitations, in particular, inconsistencies in the In-Flight Survey sampling procedures for each year and the fact that data represent a three-year time period.

References

- U.S. Department Of Commerce,
Tourism Industries, ITA: *In-Flight Survey of International Air Travelers; Data regarding international travel to the U.S. as reported on the ITA website*
- Statistics Canada: *International Travel Survey, 2001*
- Washington State Tourism: *Overseas Visitors to Washington, 1997-1999*